

Basic Instructions for Transferring Bibliographic Records or Holdings

1. Click on **Transfer title, call number, or copies**
2. Click **OK**
3. Search for the title to BE transferred
4. Select to the Transfer Box with 3 options listed
 - a. Choose **Transfer selected copies** if you want to move the HOLDINGS for selected copies
 - b. Mark which copies (*not the top box*) are to be transferred
 - c. Click on the **Transfer** command box
 - d. Click on the **Gadget** at the end of the search box
 - e. Search for the **Identify title to be transferred to Destination title**
 - f. Select Destination title
 - g. Use **View** to make sure you have selected the correct record
5. **Transfer selected volumes** can be used to transfer a single library's holdings from one record to another
 - a. Mark the holdings (using the first box)
 - b. This will move the call number and all copies to a different bibliographic record
 - c. Repeat **instructions from 1c** to complete the transfer
6. **Transfer all volumes and copies and remove title**
 - a. **Be cautious** when using this transfer command; it will delete bibliographic records from the database or merge them into another record; you will no longer be able to look at this bibliographic record!
 - b. Follow the instructions as listed in 1c; Copies and call numbers will NOT need to be marked as ALL data will be transferred to the newly selected bibliographic record
 - c. **OCLC holdings will have to be upgraded manually**